

The Columbia River/Willamette Valley 2005 Combined Federal Campaign

www.oregon.feb.gov/cfc

Campaign Coordinator & Charity Training Agenda

Tuesday, Aug. 30, 2005
8:30 - 11:30 a.m.
Country Inn and Suites, Portland

Welcome & Introductions	Ron Johnson
Today's Agenda	Tim Gallagher
What the CFC Means to Me	All
CFC Fast Facts	Ron Johnson
CFC Campaign Coordinator Responsibilities	Tim Gallagher
Campaign Materials & Tools: <ul style="list-style-type: none">- Contributor's Guide- Pledge Form- Report Envelope- Promotional items (pens, web page, e-mail video, etc.)	Jeff Sargent
Local CFC Video	Jeff Sargent
----- Break -----	
Pledge Form Processing Tips	Tim Gallagher
Planning a Campaign	Tim Gallagher
Charity Involvement	Jeff Sargent
Campaign Brainstorming	All
Question & Answer	

THE POWER OF ONE.
THE SPIRIT OF US ALL.



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2005 COMBINED FEDERAL CAMPAIGN FACT SHEET

- The CFC was founded in 1961, by order of President Kennedy, as the only official means of soliciting funds for charitable causes from Federal employees. Since 1982 the U.S. Office of Personnel Management (OPM) and Local Federal Coordinating Committees (LFCC) have administered the CFC. The CFC is the largest workplace charitable giving program in the world, raising approximately \$250 million annually.
- The Columbia River/Willamette Valley CFC is administered by the Oregon Federal Executive Board. It serves over 20,000 Federal employees in the following 25 Oregon and SW Washington counties:

Oregon: Benton, Clackamas, Clatsop, Columbia, Gilliam, Hood River, Jefferson, Lincoln, Linn, Marion, Morrow, Multnomah, Polk, Sherman, Tillamook, Umatilla, Wasco, Washington, Wheeler, Yamhill

Washington: Clark, Cowlitz, Klickitat, Skamania, Wahkiakum

- Federal employees at the Office of Personnel Management, Washington, D.C. and the Local Federal Coordinating Committee of the Oregon Federal Executive Board approve all charities that apply to the Columbia River/Willamette Valley CFC. All charities must meet national requirements to participate.
- In 2004 the Columbia River/Willamette Valley CFC raised \$1,490,544. The participation rate was 28.7% of all eligible employees in the area. Over 400 local charities and 1,600 national and international charities were listed in the brochure.
- The local CFC sends 94 cents of every dollar it collects to the designated charities. In both the 2003 and 2004 campaign years, only 6% was spent on administrative costs (contributor's guides, pledge forms, accounting and banking services, and related campaign administration expenses).
- The Columbia River/Willamette Valley CFC local web site is www.oregon.feb.gov/cfc. Included on the site is an online searchable charity directory, through which all participating charities can be searched by name, four digit code or key word. Local charities can also be searched by county served and any one of four categories of service.
- The local 2005 campaign period is October 1 - November 12th. Federal agencies are encouraged to conduct a 2-3 week campaign period and to inform all employees about the CFC without coercing anyone.

Contacts:

Tim Gallagher, CFC Manager
Ron Johnson, LFCC Chair, Oregon FEB
Jeff Sargent, CFC Rep, Oregon FEB

503-226-9375, timg@unitedway-pdx.org
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Organization Chart

Office of Personnel Management
Washington, DC

Oregon Federal Executive Board
Portland, Oregon

Federal Leaders
Oregon and SW Washington

Non-profit organization
or federation
(United Way of the
Columbia-Willamette)

**Office of
Personnel Mgmt.**

**Local Federal
Coordinating Committee
(LFCC)**

**Leadership
Team**

**Principal Combined Fund
Organization (PCFO)**

Regulations, timelines, guidance
National list, final appeals, audits

Approve local CFC budget
Contract with PCFO
Review local charity applications
CFC monitoring & oversight

Visible federal agency leadership
Make local campaign decisions
Liaison with agency executives

Manage campaign elements
Collect contributions
Account for & distribute funds
Hire CPA to perform CFC audit

**Local Federal Agencies
(coordinators, keyworkers,
leaders, donors)**

**CFC
Specialists**

**Local, National
and International
Charities**

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CFC CAMPAIGN COORDINATOR AND KEYWORKER RESPONSIBILITIES

CFC Campaign Coordinators

1. Educate yourself about the CFC, how it works and how to make a donation.
2. Ensure every employee of your agency is aware of the campaign and that you are the point of contact.
3. Ensure that every employee at your agency personally receives a 2005 contributor's guide and pledge form. Ask them to "consider" contributing to a charity of their choice.
4. Recruit, train and supervise additional team members (Keyworkers) if necessary. The standard tends to be one person to serve every 20 employees. Thus, if you have more than 20, you may want to recruit Keyworkers to assist you.
5. Create a promotional strategy to generate interest and enthusiasm in the campaign. This may include planning and directing CFC employee meetings and/or fundraising events.
6. Answer questions from your colleagues about the campaign. If there is a question you cannot answer, refer them to the contributor's guide, local web site at www.oregon.feb.gov/cfc, your CFC Specialist, or Tim Gallagher, CFC Manager, at 503-226-9375 or timg@unitedway-pdx.org.
7. Keep a record of donations and prepare the CFC report envelope for pick-up.
8. Forward your payroll deduction slips (white copy) to your payroll office.
9. Present thank you gifts to donors.
10. Thank your agency director, Keyworkers and entire agency for their involvement.

CFC Keyworkers

1. Attends training session for Keyworkers to become educated about the campaign.
2. Is responsible for personally contacting 20 - 25 co-workers to assure they have had an opportunity to participate. Explain the CFC, answers questions, and personally ask them to "consider" contributing to a charity of their choice.
3. Collect pledge forms from co-workers and checks them for accuracy and completeness. Submit your forms to the Campaign Coordinator to compile the totals.
4. Present thank you gifts to donors.

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CFC DONATION PROCESSING TIPS

Pledge Forms:

1. Separate cash & personal checks, payroll deductions and fundraisers into three bundles.
2. Ask contributors to print their name, agency name, four-digit charity codes and all other entries CLEARLY on their pledge form. Also ask contributors to use only the four- digit codes listed in the 2005 Columbia River/Willamette Valley CFC contributor's guide to designate their donation. No other codes will be accepted. More than one pledge form can be completed if someone wants to contribute to more than five charities.
3. Ask your employees to return a pledge form marked "no thanks" if they choose not to contribute. A returned pledge form means that they have decided and no longer need to be contacted; therefore, they are less likely to feel coerced.
4. Undesignated contributions will be fractionally distributed to every charity that is designated by any of the over 6,000 donors in our local campaign. In the 2004 CFC, undesignated contributions had to be divided amongst over 1,100 charities. Please encourage donors to designate their contributions, to help minimize the costs of administering the CFC.
5. Please ensure that the amount indicated as total deducted from payroll and the total of designations to charitable organizations are equal.
6. If donors are pledging by payroll deduction, they MUST sign their form.
7. If donors wish to be acknowledged, they must write in their home/e-mail address.
8. For fundraising dollars, fill out a separate pledge form and write in "FUNDRAISER" across the top along with your agency name, the total dollars on the cash/check line, and the 4-digit code of the charity or charities designated to receive the donations.
9. If an organization uses HR-Links on-line pledging, do not submit a paper pledge form.

Report Envelopes:

1. Please ensure that the totals written on the cover of the report envelope for cash & checks, payroll deduction and fundraising dollars match the envelope contents.
2. Do not seal the envelope until a CFC Specialist has a chance to review the contents as well. Please print your name and phone number on the front of the envelope. You and the CFC Specialist should both sign the envelope before sealing it.

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SIX STEPS TO A SUCCESSFUL CAMPAIGN

1. Learn about the CFC.

- Attend a campaign training session.
- Check the local web site, at www.oregon.feb.gov/cfc.
- Read the introductory section of the 2005 CFC contributor's guide.
- Be familiar with the pledge form.
- Consult with your CFC Specialist or CFC Manager Tim Gallagher, at 503-226-9375 or timg@unitedway-pdx.org.



2. Secure senior management support.

- Get an endorsement from a senior agency official to use your facilities to conduct a campaign (staff meetings, post signs, use email, hold fundraising or other events, etc.).
- If possible, ask your director or senior manager to issue a letter, e-mail or statement of support for the conduct of the campaign.

3. Recruit a team.

- If your agency has more than 20 employees, recruit others to help you so that you can personally reach every employee.
- Get others in your agency involved to create fundraisers for the CFC. They'll enjoy it and you may be planting the seed for a future campaign coordinator at your office . . .

4. Plan an efficient, inspirational campaign.

- Establish a short campaign period (typically 1-2 weeks, depending upon agency size).
- Conduct employee meetings to educate and motivate everyone about the CFC.
- Invite charity speakers to the employee meetings to describe the impact of the CFC contributions, and/or arrange site visits for employees to local charities.
- Share your own story about why the CFC is important to you and/or why you contribute.
- Put together a group to volunteer for "CFC Days of Caring."
- Include incentives and fundraising events to boost participation – make the CFC FUN!

5. Seek 100% consideration.

- Less than one in three of all federal employees donate to charities through the CFC. Of those who don't, the primary reason they give is that they were not personally asked. Set a goal to personally inform all of your employees about the campaign, give each one a pledge form, and ask him/her to "consider" giving to charities that are important to them.
- Review the benefits of giving through the CFC: payroll deduction is easy, participating charities are approved by committees of federal employees, donations through the CFC reduce charity marketing costs and thus allow them to direct more funds to services.
- Be prepared to answer questions about the CFC or refer the person to the web site, contributor's guide, or your contact person.

6. Conduct a thorough campaign wrap-up.

- Total all the pledges and arrange for a pick-up.
- Share the final results of your campaign with all employees.
- Say "THANK YOU." Thank all employees for their time and consideration. This can be done personally or through your organization's communication channels (e-mail, bulletin boards, etc.)

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COMBINED FEDERAL CAMPAIGN (CFC) – KEY MESSAGES

- The CFC is administered by the Office of Personnel Management as a convenience for federal employees and their employers (see www.opm.gov/cfc). The local campaign is directed by a volunteer board of federal employees, called the CFC Leadership Team. Wendy Haney of the Federal Highway Administration is the 2005 Columbia River/Willamette Valley CFC Chair.
- The CFC offers the **convenience** of payroll deduction, gives employees a **choice** of more than 2000 participating charities, and contributors have the added **confidence** of knowing that all charities have been approved by a team of federal employees according to national standards issued by the Office of Personnel Management.
- Charities that receive employee contributions through the CFC provide vital services to help meet the needs of people, animals and the environment. The contributor's guide lists participating CFC charities with a 25-word description of their services.
- The Columbia River/Willamette Valley CFC web page is www.oregon.feb.gov/cfc. It contains a searchable directory of the charities listed in our CFC contributor's guide. Questions about the CFC that cannot be answered by local CFC Coordinators should be addressed to the people listed on that web page.
- CFC contributions can be designated only to charities listed in the 2005 Columbia River/Willamette Valley contributor's guide. Simply enter a four-digit code (or codes) listed in the guide on the 2005 Columbia River/Willamette Valley CFC pledge form.
- Every donation, no matter how large or small, makes a difference.
- The Columbia River/Willamette Valley CFC spent about six cents of every dollar donated by employees in 2004 to pay for campaign costs. Those costs included the contributor's guide, pledge forms, donor gifts and accounting/financial services. Thus, 94 cents of every dollar contributed went directly to the specified charities.
- The Combined Federal Campaign is the largest work-place giving campaign in the world and it has been operating since 1961 with a proven record for efficiency.
- The CFC benefits charities because they have to spend less on marketing and fundraising to individuals, thus it helps lower their overhead and enable them to spend more on their services.
- CFC contributors are encouraged to designate contributions to specific charities using the assigned four-digit codes. Contributions not designated are fractionally distributed to all charities that receive designated contributions, which last year was over 1,100 charities. Distributing a donation to so many charities raises the overhead cost of processing payments.

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DATE: October 1, 2005

TO: All Employees
FROM: Director Wilson

SUBJECT: 2005 Combined Federal Campaign (CFC)

Each year at this time the Combined Federal Campaign reminds us of our good fortune. America is a country of great promise and generosity. This year's campaign theme, "The Power of One. The Spirit of Us All," represents how each of us can make a difference to improve the lives of others and the world as a whole, through the CFC.

We never know when a friend, family member, the environment or we ourselves may suddenly need help. With the CFC, those organizations will be there for us. During our campaign, you will receive information on how you can be a part of the CFC. Please review the contributor's guide, and consider a contribution to the organizations of your choice. With over 2,000 participating charities, there is bound to be one or more that address issues important to you.

This year's CFC at our office will begin (date). Our Campaign Coordinator, (name), has put together a campaign for us that expects to be both more informative and fun. I encourage all managers at our agency to give your staff the time to fully participate in the campaign. Our goal this year is to increase employee participation to _____%, and every donor and dollar makes a difference.

There is a continuous array of issues that cry for help, and we all have a "responsibility" to respond. Our community and world count on the support of those of us dedicated to freedom and compassion. I fully endorse your involvement in the 2005 Columbia River/Willamette Valley Combined Federal Campaign.

Thank you for your consideration.

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CFC "FUN"-DRAISING IDEAS

EVENTS

Off and Running

Some agencies like to have big kick-off events, such as an employee meeting featuring a continental breakfast, to open their campaigns. This is a great time for the federal agency director to endorse the CFC and talk about upcoming campaign activities like employee meetings and fundraisers.



A Ghoulishly Good Time

Many companies choose to conduct their campaign around Halloween. Have a Halloween party, create a haunted house and have a pumpkin-carving or costume contest. Try your luck at pumpkin bowling.

Boogie for Dollars

Throw a company dance or even a dance-a-thon. Charge admission, entry fees, or have entrants get pledges for time danced or for number of dances.

Thank You, Thank You, Thank You

Have a breakfast, lunch or dinner to thank your employees for participating in the CFC. Give out thank-you tickets to people who gave, or ask everyone to pay for their meals with proceeds going to CFC.

Mission Accomplished

Once your agency has reached its campaign goal, throw a finale party for the staff. Give a thank-you presentation (or have your CFC Specialist do it for you!). Serve refreshments and have prize drawings.

CONTESTS

Ugly Tie or Hat Contest

Executive staff members wear their ugliest ties or hats and solicit "votes" (a vote is \$1) from employees. The person with the most votes at the end of the day wins a prize. Contributions go to the CFC.

Match the Baby Face Contest

Employees bring photos of themselves as babies. Others buy ballots listing the photos by number, and they try to identify the photos. Offer a prize to the employee who gets the most correct answers.

Look-alike Contest

Employees dress up like famous personalities such as Marilyn Monroe or Elvis. Others pay to vote on the best costume. The contestant receiving the most votes gets a prize.

Most Humorous Photo Contest

Employees bring humorous photos to work. Employees vote for the funniest with money that goes to the CFC. The winning photographer gets a prize.

LipSync Contest

Hold a lunchtime lipsync contest. Charge an entry fee and have the audience vote for the best act. Give a prize to the winner.

Kiss the Pig Contest

Executive staff members collect \$1 votes all day. The executive with the fewest (or most) votes at the end of the week has to kiss a pig in front of the entire office.

CFC Game Show

Give Alex Trebek or Pat Sajak a run for their money and create your own CFC game show. Make up test" based on CFC facts, all available on our website at unitedway-pdx.org. prizes to employees with the most correct answers.

CFC "FUN"-DRAISING IDEAS

SPORTS

Golf Tournament or Putt-Putt Contest

Work with a nearby golf course to get reduced rates. Charge players the regular price with proceeds going to the CFC. Humorous prizes can be handed out later at a potluck dinner (shortest drive, highest score, etc.). Or, set up a miniature golf course within your own office, lobby or work area. Charge each player and award a prize to the player with the lowest score.

Tricycle Races

Before the race, employees pay to have sandbags or rolled pennies tied to opposing department managers' trikes. Hold the race in the lunchroom or outside. The first one to the finish line wins a prize for the department (such as a pizza party!).

Tug-of-War

Pit employees against executive staff or have an inter-department competition. Teams pay a fee to enter.

Team Sports Competitions

Form basketball, volleyball, softball or other teams between departments, divisions, branches or regions and get pledges for goals scored, baskets made, etc. Provide refreshment stands.

Bowling Tournament

Get a bowling alley to reduce normal fees. Charge participants the regular price with proceeds going to CFC. Participants can get pledges for the number of pins knocked over.

Office Olympics

Set up an obstacle course in the lunchroom, several offices, several floors of offices, or outside. One station can be for typing a couple paragraphs, another station for filing, another for photocopying, etc. The contestants pay an entry fee and the winner gets a prize.

Singles or Doubles

Charge an entry fee and have singles or doubles elimination. Award the winning team with a prize.

- Ping Pong-a-thon
- Darts Challenge
- Texas Hold 'em Poker (use chips, not real money!)
- Croquet Tournament
- Tennis or Racquetball Tournaments

Pedal, Stride or Stroll

Charge an entry fee. Participants collect pledges for the number of miles they ride, run or walk.

- Bike-a-thon
- Fun Run (the Army Corps of Engineers has hosted one on the Portland Esplanade for several years and raises about \$2,000 annually for the CFC).
- Walk-a-thon

CFC "FUN"-DRAISING IDEAS

AUCTIONS/SALES

Lunch Box or Gift Basket Auction

Employees supply lunches or gift baskets to be auctioned off. Give prizes for the most creative or elegant creations.

Executive Auction

Get the executive staff to donate half a day to the CFC. Then auction each executive off to the employees. The executive must take over the employee's job for half a day.

Home-grown Auction

Employees donate random items for auction such as cakes, cookies, monthly parking spots, a weekend at their summer cabin, or a home-cooked dinner. Services such as car detailing, wallpapering, or a month of lawn mowing also may be auctioned.

Rummage Sales

Employees donate items to be sold in the parking lot or cafeteria. 36

Balloon Sales

Sell CFC balloons. Stuff a message inside announcing a prize they've won or a thank you for their donation to the CFC.

Book Sales

Invite a company to sell new books at discount for 10 percent of sales toward your fundraising goal, or have employees bring in used book for a book sale and 100 percent of sales go toward your goal.

THE WAY TO A DONOR'S HEART

Food Sales

- Bake sale
- Pie-eating contest
- Candy bar or popcorn sale
- Lunchtime spaghetti or chili feed
- Pancake feed
- Lunchtime barbecue
- Oktoberfest theme with sausage lunches
- Ice cream social
- Cheesecake sale



Volunteer Opportunities & Collection Drives

The CFC "Days of Caring" will take place Oct. 6-7 this year, featuring several local charities that have offered custom volunteer opportunities for teams. Volunteering your time is an ideal way to get in touch with the needs of your community. When you combine volunteering with a team of co-workers, it's a great way to strengthen employee relations in your workplace while getting out of the office for a bit. A list of volunteer opportunities will be posted on the local CFC web site, at www.oregon.feb.gov/cfc.

To schedule a volunteer project, contact Tim Gallagher, CFC Manager, at 503-226-9375 or timg@unitedway-pdx.org.

CFC "FUN"-DRAISING IDEAS

ALMOST ANYTHING GOES

Compliment-o-grams

Make up special forms and sell them to employees as an anonymous way to give a compliment to someone in the office. Compliment-o-grams must be delivered by a trustworthy employee sworn to secrecy. Charge \$1-\$2 per compliment.

Balloon-o-grams

Have messages tied to helium balloons delivered to designated co-workers. Charge \$1-\$2 per balloon.

Dead Flower Bouquets

This is a great Halloween idea. Get flower shops and restaurants to donate dead flowers. Employees pay to have a dead-flower bouquet with a message sent to another employee. Charge a dollar or two per flower and message.

Penny Jar

Each department has a jar and each penny equals a point. Anything other coins or bills equals its value in negative points. For example, a dime is minus 10 points. The department with the most positive points at the end of a week wins a prize.

"Survivor" Penny Jar

Assign a penny jar each to several of your organization's top management. Over the course of the campaign, executive-survivors would be "voted off" by the amount of money stuffed into their coin jars.

Treasure Hunt

Sell daily clues to a mystery location where a treasure is hidden. The first employee to guess the location wins the treasure.

Cookbook Sales

Have employees donate recipes and put them together in a cookbook. Give away samples of the food while selling the cookbooks.

Car Wash

Employees pay to get their cars washed in the parking lot during the workday.

Dunk Tank

Set up a dunk tank in the parking lot. Have executives take turns on the "hot seat." Charge \$1 per try.

Dress Down for the CFC

Employees pay \$5 to wear casual clothes on a specific workday during the campaign. Each employee who participates gets a CFC sticker to wear that day.

Health and Human Service Fair

Work with your CFC Specialist and request that CFC agency booths be set up in the cafeteria or large conference room. The fair is not to make money, but it's a good way to raise awareness about the CFC.

Executive Shoe Shine

The company executives set up a shoe shine stand in a heavy traffic area. The executives shine employee shoes for a CFC donation.

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HOW CFC CHARITIES CAN GET INVOLVED IN THE CAMPAIGN

Each charity should have received a CFC Charity Participation Form via e-mail in early August, detailing the opportunities available to become more involved with the campaign. This includes:

- Attending training (which you're doing now!).
- Submitting an accurate listing for the CFC Online Searchable Charity Directory. This directory will allow viewers to search for you by name, code, key word, county served, or one of four areas of service. Your web site address will be included with an active link to it.
- Making available speakers for federal employee meetings or offering tours of your agency.
- Providing volunteer opportunities at your organization during "CFC Days of Caring," Oct. 6-7, or volunteer events and resource needs throughout the campaign.

Presentations at Federal Agencies

The CFC staff at times gets requests for recommendations for charity presenters from federal Campaign Coordinators. We encourage federal agencies to conduct employee meetings and invite charities to come and talk about their services, but we do not provide recommendations. We must be impartial and fairly represent all participating organizations.

During presentations at federal agencies, it is suggested that charity representatives:

- Briefly identify the services that your organization provides.
- Explain what a financial contribution of \$10, \$20, \$50 or more can do at your organization.
- Share your 4-digit CFC code.
- Share on what page number your listing can be found in the contributor's guide.
- Be prepared to respond to questions about your organization's overhead rate, particularly if it is over 25%.

Contacting Federal Agencies

- Charities are not permitted, by CFC regulation, to contact federal agencies or send promotional materials to them unsolicited.
- CFC staff cannot provide a list of local federal agencies or their campaign coordinators for you to contact.
- If you have been invited to speak to an agency or participate in a charity fair, you may take whatever promotional material they will permit you to bring and distribute.

Other questions about the CFC can be found on the local web site, at www.oregon.feb.gov/cfc, or should be addressed to:

Contacts:

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